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SOUTHERN APPALACHIAN PTERIDOPHYTES: AN INDEXED BIBLIOGRAPHY, 1833 - 1980

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RESEARCH/RESOURCES MANAGEMENT REPORT No. 44



U.S. DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE
SOUTHEAST REGION

UPLANDS FIELD RESEARCH LABORATORY
GREAT SMOKY MOUNTAINS NATIONAL PARK
TWIN CREEKS AREA
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AN INDEXED BIBLIOGRAPHY, 1833-1980

Research/Resources Management Report No. 44

A. Murray Evans
Botany Department
University of Tennessee
Knoxville, Tennessee 39716

Peter S. White
Charlotte Pyle
Uplands Field Research Laboratory
Great Smoky Mountains National Park
Gatlinburg, Tennessee 37738

U.S. Department of the Interior
National Park Service
Southeast Regional Office
Natural Science and Research Division
75 Spring Street S.W.
Atlanta, Georgia 30303

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INTRODUCTION

Much research has already been done on the pteridophytes (ferns and other spore bearing vascular plants--see Table 1) of the Southern Appalachians. The primary objective of this indexed bibliography is to provide researchers and naturalists with access to these accumulated studies. We have attempted herein to assemble pertinent literature on the distribution, ecology, identification, nomenclature, and evolution of Southern Appalachian pteridophytes. The entries thus include a variety of subjects from floristic and ecological treatments to biosystematic and experimental work. Intensive monographs are included for several genera (e.g., Brown 1954, Bruce 1975, Wilce 1965).

Our starting point is the Great Smoky Mountains National Park (GRSM), located in North Carolina and Tennessee, but many studies done outside GRSM have direct application here. Hence, we enlarged the perspective to include all of the Southern Appalachians. The Southern Appalachians have been defined to include the mountainous region from central Maryland, western Virginia, and eastern West Virginia, southward through western North Carolina and eastern Tennessee to northern Georgia (Blauch 1975). In addition, many papers pertaining to the Cumberland Mountains and plateau in Kentucky and Tennessee have been included, as have general works from surrounding states (e.g., Alabama, Ohio, and South Carolina). In a number of cases, papers deemed important in the understanding of Southern Appalachian pteridophytes were included, even if they covered areas outside the region. This has been especially true in experimental population studies (e.g., Holttum 1949, Klekowski 1972 ff., Levin and Crepet 1973, Mathews and Murdy 1969, Shivas 1961, Watt

Table 1. Families and genera of Southern Appalachian Pteridophytes.
(See Crabbe et al., 1975.)

Family	Genera	Representative Common Names
Lycopodiaceae	<i>Lycopodium</i>	Clubmosses
Selaginellaceae	<i>Selaginella</i>	Spikemosses
Isoetaceae	<i>Isoetes</i>	Quillworts
Equisetaceae	<i>Equisetum</i>	Horsetails
Ophioglossaceae	<i>Botrychium</i> <i>Ophioglossum</i>	Grapeferns Adder's tongue ferns
Osmundaceae	<i>Osmunda</i>	Cinnamon, Interrupted and Royal ferns
Schizaeaceae	<i>Lygodium</i>	Climbing fern
Adiantaceae	<i>Adiantum</i> <i>Cheilanthes</i> <i>Pellaea</i> <i>Vittaria</i>	Maidenhair ferns Lip-fern Cliff-brakes Appalachian gametophyte
Dennstaedtiaceae	<i>Dennstaedtia</i>	Shoestring fern
Hymenophyllaceae	<i>Pteridium</i>	Hayscented fern
Polypodiaceae	<i>Trichomanes</i> <i>Polypodium</i>	Bracken Filmy-fern Polypody
Thelypteridaceae	<i>Thelypteris</i> (incl. <i>Phegopteris</i>)	New York fern and others
Aspleniaceae	<i>Asplenium</i> (incl. <i>Camptosorus</i>) <i>Athyrium</i> <i>Woodsia</i> <i>Cystopteris</i> <i>Gymnocarpium</i> <i>Dryopteris</i> <i>Polystichum</i> <i>Onoclea</i>	Spleenworts Ladyfern and others Woodsia Fragile fern and others Oak fern Woodfern, Shieldfern Christmas fern Sensitive fern
Blechnaceae	<i>Woodwardia</i> (incl. <i>Anchistea</i> and <i>Lorinseria</i>)	Chain-fern

1940 ff.). Other studies cited are based on worldwide analyses of species, genera or families (e.g., Hauke 1963). Hence, the bibliography contains key references to Southern Appalachian taxa even if the work was entirely or primarily based outside this region.

A number of works are cited which are treatments of vascular plants as a whole--they are included for their pteridophyte sections. For example, most of the treatments listed in the index under "Rare species" are lists of all rare vascular plants in the regions studied (e.g., Cooper et al. 1977). A number of regional floristic checklists of vascular plants (e.g., Thomas 1966) or floristic manuals (e.g., Fernald 1950) have thus been included.

The bibliography is, of course, dominated by floristic works (see entries under "Distribution" in the Index). Many of these provide the basis for future studies in specific areas or localities. With the inherent "natural history" bent of most papers of this type, they also represent the baseline ecological, distributional, and population information for the taxa of this region. There are also many cited works on identification and systematics of the plants (see "Systematics...." in the Index).

Ecological papers--whether on community or populations levels--are conspicuously few in number. However, most general vegetation studies have not been included here; these will form a second bibliography in this series. The literature on the structure, composition, and environmental relations of Southern Appalachian vegetation is very extensive. It contains much information on pteridophyte occurrence and distribution but if included would create an unwieldy bibliography for the student primarily interested in field-oriented pteridophyte research.

Table 2. Frequency of citations by year.

<u>Years of publication</u>	<u>Number of citations</u>
1800-1850	1
1850-1900	15
1900-1909	16
1910-1919	8
1920-1929	11
1930-1939	40
1940-1949	38
1950-1959	61
1960-1969	98
1970-1980	76
 Total	365

Within the same constraints on the size and scope of the bibliography, references to reports of more strictly laboratory-oriented research in genetics, chemistry and physiology, etc., are limited although not completely eliminated. The selections were made to direct the reader to studies believed to be useful in reference to regional pteridophyte populations.

Some 365 books, theses, journal articles, and manuscripts are cited. These cover about 150 years, from Griswold et al. (1833) to the present (Table 2).

Of course, no such work can ever be deemed complete; indeed, as this bibliography is being printed, additional references are undoubtedly being published which would warrant inclusion. We call attention to the "Index to American Botanical Literature" published in each issue of the Bulletin of the Torrey Botanical Club. This index has a "Pteridophyte" subheading.

METHODS

The bibliographical search was done at Great Smoky Mountains National Park (GRSM) and the University of Tennessee at Knoxville (UTK). At GRSM the park archives and library were searched and references were retrieved from the files of Peter White at Uplands Field Research Laboratory and from the files of Don DeFoe, GRSM Interpretation. At UTK a cross-referenced card file developed by Murray Evans was extensively used. In addition, theses and journals were searched at UTK libraries--in particular, American Fern Journal, Castanea, Journal of the Elisha Mitchell Science Society, and Rhodora were reviewed.

Since the study area can only be arbitrarily defined and many genera range far beyond the Southern Appalachians, there are undoubtedly appropriate papers that have been omitted. The senior author takes responsibility for the final choices. It is hoped that this bibliography represents a comprehensive sample of the literature appropriate to continued research on the pteridophyte flora of the Southern Appalachians.

GRSM ARCHIVES

Simultaneously with the literature search reported here, we also searched the GRSM archives for pertinent information on pteriophytes because we were aware that some information contained therein has never been published. Important archival information at GRSM included the journals of Arthur Stupka (Park Naturalist; Park Biologist), the report by H. M. Jennison (1939), and miscellaneous correspondence and manuscripts of A. J. Sharp (including Sharp 1942). We have cited only the more important manuscripts. Other information on floristic research in GRSM is contained in the Collecting Permit files (Division of Interpretation, GRSM) and the Investigator's Annual Reports (Office of the Superintendent, GRSM). Finally, abstracts from the Annual Science Meetings at GRSM are printed by the Southeast Regional Office (write Uplands Field Research Laboratory for information) and contain reports of floristic research currently ongoing in GRSM and the surrounding area.

NOTES ON THE INDEX

The categories listed in the index require a few words of explanation. A primary word of caution is that citations under the various generic

names follow usage in the paper cited. Thus, Camptosorus appears in the index, although species in this genus have been transferred to Asplenium by most authors (e.g., Evans 1968). Likewise, some of the papers cited under Dryopteris deal with species that are often transferred to Thelypteris. Floristic papers which list numerous fern taxa are not cross-referenced by genus.

In addition, some categories are difficult to define--as the separation of "monographs" from "systematics" in the index. We have made all such choices to the best of our ability. We hope that the student of pteridophytes will be able to make good use of those choices. Nearly every paper we are concerned with relates to either identification or distribution--hence the two longest lists of papers are under "Distribution" and "Systematics . . . ". In general, the shorter lists of citations concern more specific topics (e.g., "Cytology ...").

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As the Nation's principal conservation agency, the Department of the Interior has responsibility for most of our nationally owned public lands and natural resources. This includes fostering the wisest use of our land and water resources, protecting our fish and wildlife, preserving the environment and cultural value of our national parks and historical places, and providing for the enjoyment of life through outdoor recreation. The Department assesses our energy and mineral resources and works to assure that their development is in the best interests of all our people. The Department also has a major responsibility for American Indian reservation communities and for people who live in island territories under U.S. administration.

